

Retirement Plan Enrollment

How to Set Up Your Account

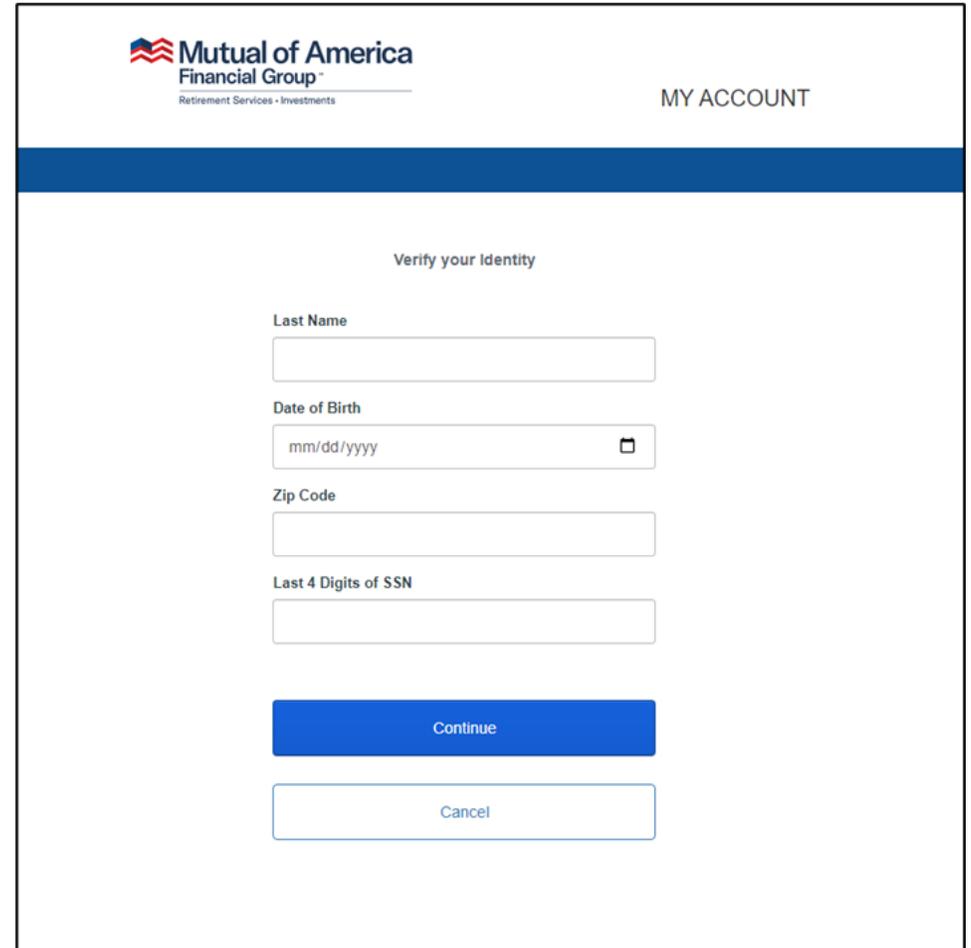
Prepared for:
{Organization Name}
Month 00, 2020

How to Set Up Your Account

Identity Verification

Step 1: Go to www.mutualofamerica.com/signup.

- Enter your personal information (last name, DOB, Zip Code and last four digits of SSN), and then your information is verified against our database to confirm that you have an active plan account. *(If the data entered does not match, you'll receive an error message and will need to correct the data before moving forward.)*



The screenshot shows the 'Verify your Identity' form on the Mutual of America website. The page header includes the Mutual of America Financial Group logo and the text 'MY ACCOUNT'. The form contains the following fields and buttons:

- Verify your Identity** (Section Header)
- Last Name** (Text label above a text input field)
- Date of Birth** (Text label above a date input field with a calendar icon and placeholder 'mm/dd/yyyy')
- Zip Code** (Text label above a text input field)
- Last 4 Digits of SSN** (Text label above a text input field)
- Continue** (Blue button)
- Cancel** (Light blue button)

How to Set Up Your Account (continued)

Identity Verification

Step 2: Answer your security questions.

- Your answers are submitted to Experian when you click **“Submit.”**

(If you answer a question incorrectly, you'll receive an error message. Select “Try again” to restart the Identity Proofing process.)



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MY ACCOUNT

Security Questions

1 I was born within a year or on the year of the date below.

1954
 1957
 1960
 1963
 NONE OF THE ABOVE/DOES NOT APPLY

2 Using your date of birth, please select your astrological sun sign of the zodiac from the following choices.

AQUARIUS
 LIBRA
 SAGITTARIUS
 CANCER
 NONE OF THE ABOVE/DOES NOT APPLY

3 Using today's date to determine your current age, how old will you be in exactly 5 years?

64
 66
 68
 70
 NONE OF THE ABOVE/DOES NOT APPLY

4 Which of the following represents the last four digits of your primary checking account number?

6056
 6065
 6074
 6083
 NONE OF THE ABOVE/DOES NOT APPLY

5 According to your credit profile, you may have opened a mortgage loan in or around December 2017. Please select the lender to whom you currently make your mortgage payments. If you do not have a mortgage, select 'NONE OF THE ABOVE/DOES NOT APPLY':

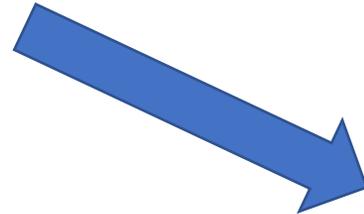
SUN WEST MTG
 WASHINGTON FEDERAL SVGS
 MANCHESTER MORTGAGE
 MID AMERICA MORTGAGE
 NONE OF THE ABOVE/DOES NOT APPLY

How to Set Up Your Account (continued)

Account Setup

Step 3: Set up username and password.

- After establishing your username and password, you'll need to enter your email address and choose a security question from the dropdown under “Choose a forgot password question” and provide the appropriate response in the “Answer” field.
- You will receive a confirmation email that includes a verification link.
- After you complete the email verification, you will be directed to the page to set up Multifactor Authentication.

A screenshot of the Mutual of America account registration page. The page features the Mutual of America logo and "MY ACCOUNT" in the top right. The main heading is "Sign Up". Below this, there are several input fields: "Username *", "Email *", "Password *", and "Confirm Password *". A dropdown menu labeled "Choose a forgot password question" is highlighted with a red oval; the selected option is "What is the food you least liked as a child?". Below the dropdown is an "Answer *" field. At the bottom, there is a blue "Register" button and a "Back to Login" link. A note indicates "* Required field".

How to Set Up Your Account (continued)

Multifactor Authentication

Step 4: Set up Multifactor Authentication.

- You must complete at least one security factor to complete the registration process. Clicking on **“Set Up”** displays the enrollment form for each factor.
- There are four security factors available: Okta Verify (which requires installing the Okta app on your phone), SMS Authentication, Voice Call Authentication and Email Authentication.
- The security factor you select will be the method we use to contact you for identity verification during subsequent login attempts to your account.



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MY ACCOUNT

Set Up Multifactor Authentication.

We require multifactor authentication to add an additional layer of security when signing in to your account.

- Okta Verify**
Enter a single-use code from the mobile app.
- SMS Authentication**
Enter a single-use code sent to your mobile phone.
- Voice Call Authentication**
Use a phone to authenticate by following voice instructions.
- Email Authentication**
Enter a verification code sent to your email.

First time here? [Create your secure account/Sign up.](#)

How to Set Up Your Account (continued)

Multifactor Authentication (continued)

Step 5: Enter information for your selected factor. (Example uses SMS Text security factor.)

- Enter your phone number and click **“Send code.”**
- You will receive a text message that includes the authentication code.
- Enter code to complete Multifactor Authentication process, or select additional security factor.
- Lastly, click **“Create your secure account/Sign Up,”** and then go to SmartPlan to enroll.

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MY ACCOUNT

SMS

Receive a code via SMS to authenticate

United States

Phone number

+1 [input field] [SMS icon]

Send code

[Back to factor list](#)

First time here? [Create your secure account/Sign Up](#)

Thank you!

**We look forward to serving you now
and in the years to come.**



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